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ABSTRACT

Compared here is the cost of year-round education (YRE) with that of traditional education in the Oxnard (California) School District in 1981-82. Three approaches were used. The first computes the YRE program costs during the summer when the traditional school is not in session, revealing that an 850-student YRE school incurs $39,299 in costs during this period. The second approach computes the per student expense for students in each program, revealing that the cost for educating pupils in the YRE school was $80 less per pupil than that in the traditional schools. The final approach computes the costs of new school facilities and operating expenses required to serve the 536 extra students now accommodated in the YRE program, revealing that the YRE program allowed the district to operate with one less building, producing a savings of $160,027. Other beneficial cost factors inherent in YRE schools are noted, including reductions in teacher and student absences and school vandalism. The paper closes by warning that a system with adequate classroom space would not experience the same savings as has Oxnard, a rapidly growing district. (JM)

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COST ANALYSIS OF YEAR ROUND EDUCATION IN THE OXNARD SCHOOL DISTRICT

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A presentation to the 14th Annual Meeting of the National Council on Year-Round Education

January 19 - 21, 1983

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THE OXNARD SCHOOL DISTRICT -- GENERAL INFORMATION

The Oxnard School District is a K-8 school system serving approximately 10,500 students within the City of Oxnard, California.

Oxnard has been identified in several recent national publications as the seventh most rapidly growing city in the U.S. The city's current (1983) population is estimated at 115,000. This growth in population, during a period of extreme funding limitations for new school facilities, has required that the District make the most economically efficient use of its 15 existing schools through phased implementation of a Year Round Education program.

YRE was first implemented at two elementary schools in 1976 as a means to relieve general district-wide overcrowding. As enrollments continued to increase, one additional elementary school was added to the YRE program in 1980; in 1981, two more schools were added, and in 1982, it was necessary to add five schools to YRE to assure adequate classroom space for enrollment growth.

During the 1982-83 school year, the Oxnard School District maintains nine YRE elementary schools and one YRE intermediate (7-8) school.

Planning is currently in progress to add the District's second intermediate school to the YRE schedule beginning with the 1983-84 school year.

All YRE schools of the District are maintained on the 60-20 plan, with four staggered YRE tracks, plus a fifth track offering the traditional school year calendar.

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While the District offers five calendar (or vacation) options, 4 YRE and the traditional, it is estimated that in three or four years, it may become necessary to eliminate the traditional calendar in some schools. When all students enrolled in a school are scheduled into YRE tracks, the school then has the potential to approach a 100% use efficiency. (For each three seats occupied by students in a traditional school year, four students can share those same seats in our YRE program.)

In general, YRE has been extremely well accepted by parents, students, and the staff of the Oxnard School District. The program, among its many financial and educational advantages, has made it possible for the District to present an educational program with maximum financial economy during a time when most school districts are experiencing hard times. YRE is clearly one of the factors contributing to the relatively secure fiscal condition of the Oxnard School District -- without compromising the quality of its educational program.

APPROACHES TO AN ANALYSIS OF YRE COSTS

There are at least three approaches which can be taken to analyze the comparative costs of YRE and non-YRE schools: (1) computing the per student (ADA) expense for students in each program, (2) computing the costs for new school facilities and operational expenses required for enrollment which exceeds the district's available classroom space, and (3) computing the costs incurred by a YRE program during the period when the traditional school program is not in session -- from mid-June through August when the last YRE track ends.

An analysis utilizing these three computational approaches has been made for the five YRE/Traditional elementary and seven Traditional-only elementary schools operating within the Oxnard School District during the 1981-82 school year.

The most valid comparison of the costs of YRE and non-YRE (traditional) schools, I believe, results from a computation which yields the ADA unit expense per student in each program.

The following 1981-82 financial and enrollment data for the District's YRE and Non-YRE schools were utilized in preparing this analysis.

YRE AND NON-YRE SCHOOL ENROLLMENT: 1981-82 SCHOOL YEAR

NON-YRE (K-6) (Traditional Schools)

School	Students
Elm	449
Harrington	518
Kamala	730*
Lemonwood	373
McKinna	656*
Ramona	525*
Sierra Linda	698*
TOTAL	3,949

NON-YRE (Intermediate 7-8) (Traditional Schools)

School	Students
Fremont	1,123 *
Haydock	905 **

* Became YRE in fall of 1982

** To become YRE in fall of 1983

YRE-Traditional (K-6) Schools

School	Students
Curren	
YRE	291
TRAD	511
TOTAL	802
Driffill	
YRE	577
TRAD	310
TOTAL	887
Juanita	
YRE	447
TRAD	316
TOTAL	763
Marina West	
YRE	470
TRAD	412
TOTAL	882
Rose Avenue	
YRE	361
TRAD	492
TOTAL	853

TOTALS (K-6)

YRE	2,146
TRAD	2,041
TOTAL	4,187

NON-VARIABLE SCHOOL EXPENSES FOR YRE AND NON-YRE SCHOOLS

Teacher Salaries/Benefits
Instructional Supplies*
Textbooks*
Capital Outlay*
Equipment Replacement*
Study Trips*
Special Education Services*
District Compensatory Education*
School Lunch Program
Gardening/Grounds

*Funds appropriated on an enrollment count or on an established pupil/teacher ratio formula by grade level

VARIABLE EXPENSES FOR EXTENDED YRE SCHOOL YEAR IN A SCHOOL OF 850 STUDENTS: 500 YRE AND 350 TRADITIONAL

Administrator Salaries/Benefits
Instrumental Music Teacher Salary/Benefits
School Secretary Salary/Benefits
Clerical Salaries/Benefits
Custodial Salaries/Benefits
Maintenance
Utilities
Pupil Transportation
Equipment (Cabinets) One-time cost
Equipment (Office) One-time cost

FEDERAL-STATE CATEGORICAL AND SPECIAL EDUCATION FUNDS

Federal, state and district-provided compensatory and special education funds have been excluded in this cost comparison of YRE and non-YRE schools. These funds are designated for pupils who meet specific eligibility criteria. Funds available from the various

compensatory and special education programs have been spread through the full twelve months when schools are in session. Eligible students enrolled in any of the four YRE tracks receive the same categorical services as their counterparts enrolled in the traditional school calendar.

The Oxnard School District does not incur greater costs on a per-pupil basis for YRE students eligible for compensatory and/or special education services because members of the professional staff have agreed to work on the basis of a modified duty year, i.e. time off during the traditional calendar in exchange for days worked during the summer. Thus each YRE child enrolled in special education receives the same service as if enrolled in the Non-YRE (traditional) program.

CAFETERIA PROGRAM

The Oxnard School District maintains a school lunch program which is "cost-efficient" from funds of the cafeteria account. The District provides the same cafeteria services for the three summer months as during the traditional school year.

Since this program does not incur District general fund expenses, the school lunch program costs have not been included in this YRE and Non-YRE school cost analysis.

TRANSPORTATION PROGRAM

The Oxnard School District is heavily involved with pupil transportation. Six schools are paired (primary and upper grades in separate schools) as required by a Federal desegregation court order; this program, plus the normal transportation required for children living beyond 1-1/2 miles from their school, involves approximately 30% of the District's enrollment.

During the 1981-82 school year, the District incurred $30,599 in expense to transport YRE students on the 64 days when the traditional school program was not in session. The State transportation reimbursement was 63% of this expense; the District's General Fund portion of this cost was $11,321.

YRE PROGRAM COST ANALYSIS I

If a YRE cost analysis is limited only to those expense items which vary from the traditional school year, that is, those which occur only from mid-June through August, these cost items are relatively easy to isolate.

Based upon a typical 850 student school with 500 YRE students and 350 traditional students, our data would indicate the following YRE-related costs:

	One-Time Expense	Continuing Expense
Administrator Salaries Benefits		$ 4,988*
School Secretary Salary/Benefits		$ 2,922
Clerical Salaries/Benefits		$ 11,004
Custodial Salaries/Benefits		$ 1,721
Maintenance		$ 5,005
Utilities		$ 7,259
Equipment (Cabinets)	$ 8,500	
Equipment (Office)	$ 1,500	
Instrumental Music Teacher Salaries/Benefits		$ 3,500
Pupil Transportation		$ 2,830**
TOTAL	$ 10,000	TOTAL $ 39,299

*YRE principals are assigned to a 12-month work year, rather than 11-month assignments at Non-YRE schools, and receive a proportionate salary increase plus an increased entitlement from 19 to 21 vacation days per year. Since YRE principals must take vacation days when school is in session, $1,500 per year is required for short-term administrative coverage of YRE schools. This amount is included in this variable expense.

**Oxnard School District General Fund Expense

YRE PROGRAM COST ANALYSIS II

A complete itemization of the costs which the District's General Fund incurs for YRE, above and beyond the costs of maintaining the traditional September to June school year, produces a net expense per unit of ADA which is less than the expense incurred for educating a pupil in the traditional school year.

Considering all appropriate school-level General Fund costs for the 1981-82 school year,* the Oxnard School District spent $1,141 to educate each student enrolled in the District's traditional-only schools.

Utilizing the same budget accounts for comparison, the District spent $1,061 to educate each student enrolled in the District's YRE-Traditional schools.

The 1981-82 cost for educating pupils in the YRE-Traditional schools was $80 per year less than the cost for educating pupils in the traditional-only schools.

Since there was a total of 4,187 students in the five YRE-traditional schools incurring an $80 expense less than the per-pupil rate in traditional-only schools, it is reasonable to state that YRE saved the District $334,960 during the 1981-82 school year.

Comparing "apple-to-apple" school-level costs drawn from the same 1981-82 budget accounts, the cost differences between YRE and Non-YRE schools may be described as follows:

The District's average Non-YRE school of 564 pupils incurred an expense of $644,088 with an average pupil cost of $1,142.

The District's average YRE school of 837 pupils incurred an expense of $889,319 with an average pupil cost of $1,062.

The per-pupil cost advantage in YRE schools is primarily attributable to the general cost effectiveness inherent in maintaining a larger student population with classes (tracks) spread through a 12-month school calendar.

While the Oxnard School District is providing the same quality instructional program for its YRE and Non-YRE students, it is doing so with an $80 per pupil saving for those pupils enrolled in each of the five (1981-82) YRE schools.

Since there were 4,187 students enrolled in the five YRE schools during the 1981-82 school year, that number of students multiplied by $80 yields a financial advantage to the District in the amount of $334,960. This produces a cost advantage of $66,992 for the average (837 student) YRE school.

*California Accounting Manual Accounts 1000 through 6000

YRE PROGRAM COST ANALYSIS III

Another means for comparing the relative costs of YRE and traditional schools is to consider that during the 1981-82 school year, there were five schools on YRE, each enrolling more students than they could accommodate in the traditional (September to June) program.

School	Students Enrolled Beyond Normal Capacity
Curren	73
Driffill	144
Juanita	112
Marina West	117
Rose Avenue	
TOTAL	536

The average enrollment of the District's seven non-YRE schools during the 1981-82 school year was 564 pupils.

The 536 students enrolled beyond the District's capacity, therefore, was equal to one additional school.

Because the District is making efficient utilization of its schools in a YRE program, there has not been a need for the following:

	One-Time Expense	Continuing Expense
One school building facility	$ 2,500,000	
Land/site (10 acres at $70,000 per acre)	$ 700,000	
Equipment	$ 150,000	
Administrator/Benefits		$ 47,121
Secretary/Benefits		$ 16,222
Clerical Staff/Benefits		$ 14,619
Custodial Staff/Benefits		$ 39,943
Utilities		$ 20,091
Maintenance		$ 17,051
Grounds		$ 9,980
TOTAL	$ 3,350,000	TOTAL $ 160,027

OTHER BENEFICIAL COST FACTORS INHERENT IN YRE SCHOOLS

1. TEACHER ILLNESS ABSENCES

In a three year study (1979-80; 1980-81; 1981-82) involving the YRE and traditional teachers assigned to YRE-Traditional schools, the average annual illness absence rate for YRE teachers was 6.03 days; the average annual illness absence rate for traditional teachers was 7.24 days -- a difference of 1.27 days per teacher per year.

1979-80 School Year
(Marina West and Rose Avenue Schools)
YRE Teachers - 25
Traditional Teachers - 39

1980-81 School Year
(Marina West, Rose Avenue and Driffill Schools)
YRE Teachers - 46
Traditional Teachers - 39

1981-82 School Year
(Marina West, Rose Avenue, Driffill, Juanita and Curren)
YRE Teachers - 75
Traditional Teachers - 66

During these three years, the District incurred a cost of $44,829 for substitutes for the illness absences of 144 traditional teachers and $37,855 for substitutes required for the illness absences of the 146 YRE teachers.

The average annual cost of substitutes for each YRE teacher was $259 and $311 for each traditional teacher.

2. UNEXCUSED STUDENT ABSENCES

During the 1980-81 school year, a comprehensive study was done on unexcused student absences at the three YRE schools: Marina West, Rose Avenue and Driffill schools.

Average Monthly Unexcused Absence Rate

YRE Students	1.3% (1380 students)
Traditional Students	2.5% (1361 students)

The reduced unexcused absence days for the 1380 students enrolled in YRE classes generated $26,743 more in school revenue than if they had the same rate of unexcused absences as the 1361 traditional students in these three schools.

3. REDUCTION IN SCHOOL VANDALISM AND BURGLARY

There has been a consistent pattern of reduced vandalism and burglary loss at YRE schools. When school personnel, including night custodians on duty until midnight, occupy our YRE school buildings virtually 12 months a year, these schools tend to be a less attractive target for vandals and burglars than schools vacant from June to September.

Indicators of this reduction in vandalism and burglary expense include the following:*

	1979-80	1980-81	1981-82
Broken Windows	$ 19,020.64	$ 13,202.74	$ 6,524.45
Replacement of Damaged Door Locks	$ 3,474.14	$ 2,072.97	$ 1,937.24
Burglary (Equipment/ Property) Loss	$ 15,292.00	$ 2,997.00	$ 5,573.00
TOTAL	$ 37,786.78	$ 18,272.71	$14,034.69

*These items were selected for this comparison because they are the most costly losses annually incurred by the District.

SUMMER SCHOOL/YRE INTERSESSION REMEDIATION PROGRAM

The Oxnard School District has traditionally offered a summer school program for its students. However, during the 1982-83 school year, the program will be limited to students in grades six through eight who have not demonstrated mastery in the District's minimum skills testing program.

All eligible YRE and Non-YRE students have the opportunity to enroll in a 4-week special remediation program offering 240 minutes of daily instruction.

The 1982-83 remediation sessions will be presented during the following periods:

Track	Dates
B	April 25 through May 20, 1983
A	May 23 through June 17, 1983
D and Traditional (Non-YRE)	June 20 through July 15, 1983
C	August 1 through August 26, 1983

The District's 1983 summer school/YRE intersession remediation program is projected to enroll the following number of students:

	TRACKS					
GRADE	A	B	C	D	TRADITIONAL NON-YRE	TOTAL
6	15	13	17	15	50	110
7	35	24	33	40	70	202
8	17	12	11	7	65	112
TOTAL	67	49	61	62	185	(424)

It has been estimated that the District's 1983 Summer School/YRE Intersession Remediation program will cost approximately $40,000 for a projected enrollment of 424 students.

The program costs for grades seven and eight will be $29,600 for 314 students. Approximately 60% of the summer school/YRE intersession remediation program ADA ($11,995) is funded by the State; the District's General Fund will provide the remaining program expense of $17,605.

The total program cost for the 110 sixth grade pupils participating in this program will be a District General Fund expense is estimated at $10,400. This cost estimate for the 60 YRE sixth grade pupils is $5,668; the cost for the 50 Non-YRE sixth grade pupils is $4,732.

SUMMARY

To calculate the continuing, annual costs attributable to YRE (i.e. extended work year and salaries for administrators, secretarial-clerical staff, custodians, maintenance, utilities, etc.) which average $39,299 for a school of 850 students, without computing the per-pupil unit cost is totally misleading and fails to present an accurate assessment of the cost advantages to a YRE program.

It is obvious that school size is a major factor in cost effectiveness: a traditional school with 750 pupils is more cost efficient than a school of 500 students.

A YRE school of 900 pupils, with the added costs required for the extended YRE school year, is more cost efficient than a traditional school for 750. Our data would indicate that in such an instance, we can educate 900 students (at $1,062 per child) in a YRE program for $72,000 less than the cost per pupil rate (of $1,142 per child) which we are now incurring in our traditional schools.

No attempt has been made in this report to include the cost advantages of YRE which may be attributable to a) a reduction in teacher illness absences, b) the reduced rate of unexcused student absences, and c) the reduction in school vandalism and burglary losses. There is clear evidence that these cost factors further enhance the financial advantage of Year Round Education in the Oxnard School District.

If a school district has a stable pupil enrollment with adequate classroom space to accommodate its enrollment, YRE would incur additional costs. Such costs would likely be comparable to those indicated by my YRE Program Analysis One, presented on page 6 of this report.

In many school districts, declining enrollment has resulted in schools with empty classrooms, and in some instances, with consolidation of school attendance areas and empty schools. When such districts are already experiencing financial pressures, YRE hardly seems within the realm of financial possibility.

YRE's principal financial advantage is its potential to use a school facility to its maximum capacity for 12 months during the year.

Districts, therefore, experiencing enrollment growth which will exceed available classroom space, have the golden opportunity to offer any number of YRE options which result in proven financial advantages and many fringe benefits, some of which have been identified in this paper.

While there is ample and convincing evidence to support cost effectiveness --indeed, advantage-- in utilizing YRE as a means to accommodate student enrollments which exceed otherwise available classroom space, there is also a generally accepted opinion held by school administrators, teachers and parents that YRE provides strong educational advantages.

Students enrolled in the traditional school year normally lose some of their acquired skills and knowledge during a 3-month break in their educational program. The three shorter vacation breaks within the 60-20 YRE calendar assures greater continuity of learning and minimizes the loss of learning which results from a 3-month summer vacation.

Teachers generally agree that students are most eager and receptive to learning during the period following the opening of the traditional school year in September.

Teachers in a 60-20 YRE program have this "September phenomenon" three times per year --each following the three scheduled one-month vacation breaks.

Little hard research has been done to verify the advantages of YRE to learning acquisition and student behavior. As school districts become more involved in computer-assisted record keeping, it may be possible to retrieve data which assesses these potential advantages of YRE. This area would be a fruitful and exciting endeavor. If learning time can be equated in some way to the cost of educating a child, YRE may be found to have another very significant financial advantage.